

County of San Diego
Revised: December 11, 2002
Reviewed: Spring 2003

APPRAISER TRAINEE
APPRAISER I
APPRAISER II
APPRAISER III
APPRAISER IV

Class No. 005510
Class No. 005505
Class No. 005504
Class No. 005503
Class No. 005502

DEFINITION:

To appraise real and personal property for tax assessment purposes; and to perform related work.

DISTINGUISHING CHARACTERISTICS:

Appraiser is a professional class series, found only in the Assessor's Office, which determines the market value of real and personal property for tax assessment purposes. Appraisers inspect property and consider factors such as: comparable properties, current market value, property location, and building and replacement costs, to determine property value. Appraisers interpret and apply the California Revenue and Taxation Code and perform personal property appraisals on businesses, livestock, farm equipment, and marine and aviation property; and real property appraisals of residential, commercial and industrial property.

Appraiser Trainee: This is the trainee class in the appraiser series. Under immediate supervision, incumbents assist higher-level appraisers, receive technical assistance, and learn to perform progressively more difficult residential property appraisals.

Appraiser I: This is the entry-level class in the Appraiser series. Under immediate supervision, incumbents perform progressively more responsible and independent appraisals. In the Real Property Division, incumbents appraise residential subdivisions, tracts and areas with an active market and a fair degree of comparability among properties. In the Business Division, Appraiser I's are assigned small, service industry, and retail establishments such as neighborhood stores, dry goods, hardware, clubs, and cafes.

Appraiser II: This is the journey-level class in the appraiser series. Under general supervision, incumbents independently perform appraisal work on any kind of personal and/or residential real property. As incumbents gain experience, they may be assigned to assist higher appraiser classes with commercial and industrial property appraisal projects.

Appraiser III: This is the first lead-level class in the series. Under direction, Incumbents perform the most complex and difficult appraisal work of residential and small business property. Appraiser III's also provide technical guidance and training to subordinate appraiser classes in the residential and small business property unit.

Appraiser IV: This is an advanced lead level class. Under direction, incumbents perform the most difficult and complex appraisals of large, major, commercial and industrial properties. Appraiser IV's assist in training and development of subordinate Appraisers, members and present the most complex cases to Assessment Appeals Board. Appraiser IV differs from the next higher class, Supervising Appraiser I, in that the latter, is a first line supervisor responsible for directing, coordinating and supervising a unit of appraisers appraising residential and small business property.

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EXAMPLE OF DUTIES:

Interviews property owners, business managers and realtors regarding building costs and resale value; appraises land and improvements; prepares reports and correspondence and performs related clerical work; computes values according to standardized methods; makes sketches showing locations of improvements on land and parcels; makes itemized appraisals of livestock, store fixtures, heavy equipment, tools and all types of personal property.

Appraiser I and II:

All of the duties listed above plus: Investigates and analyzes data in the appraisal of land and buildings, and other structures for tax assessment purposes; determines total parcel values and residual land and building values from sales, income and depreciated replacement cost data; explains tax methods and procedures to taxpayers; investigates complaints and makes recommendations; processes assessment appeal cases and testifies before Assessment Appeals Board; and performs the work listed below in specialized assignment areas:

Real Property:

Determines replacement costs for residential and/or commercial, industrial structures; appraises residential income properties; evaluates sales, lease conditions, financing terms, vacancy ratio; inspects interior and exteriors of buildings to determine basic cost and changes affecting value; determines class of structures; measures and diagrams structural improvements; determines income flow to establish market value; appraises rural properties; analyzes topography water rights, location of amenities such as roads and utilities; determines highest and best use of properties; analyzes zoning of surrounding properties.

Personal Property:

Analyzes value of capitalized and expensed assets; uses published valuation guides; applies applicable percent good tables and economic lives; applies guidelines for equipment cost per square foot for comparable businesses; analyzes and evaluates accounting controls of smaller manufacturers to determine cost and value of goods and work in progress; inspects and makes itemized appraisals of livestock, poultry and farm equipment; appraises and establishes value of marine and aviation property.

Appraiser III:

All of the duties listed above plus: conducts complex appraisals on personal property, residential and small business properties; uses all appropriate appraisal theories and knowledge of market indicators to determine market value of such properties; provides technical guidance and training to subordinate appraisers; leads and reviews field and office work and ensures that departmental procedures and policies are followed on projects; counsels property owners, attorneys, tax representatives and other professionals regarding appraisals and assessment appeals; prepares and presents the Assessor's case before the Assessment Appeals Board; in the Real Property area, performs difficult and complex appraisals of real property such as custom homes, complex residential income properties, large rural acreage holdings, and small and mid-sized commercial and industrial properties; in the Business Personal Property area, performs the most complex and difficult physical property appraisals of large retailers, manufacturers and hotels; may develop cost guides and depreciable life tables for appraisal programs.

Appraiser IV:

All of the duties listed above plus: performs the most difficult and complex appraisals of commercial and industrial property; appears before the Assessment Appeals Board to present the most complex cases, substantiate appraisals and/or act as an expert witness; performs the most difficult and complex appraisals such as the largest commercial and industrial properties, downtown and regional shopping centers, and large rural acreage holdings; may head a

team of appraisers in a given geographical area; acts in the absence of supervisor.

MINIMUM QUALIFICATIONS:

Knowledge Level: T = Thorough G = General -- = Not Applicable

Classification Level: AT = Appraiser Trainee
I = Appraiser I
II = Appraiser II
III = Appraiser III
IV = Appraiser IV

Knowledge of:

<u>AT</u>	<u>I</u>	<u>II</u>	<u>III</u>	<u>IV</u>	
--	T	T	T	T	California Revenue and taxation code as it relates to the appraisal of property.
--	T	T	T	T	Methods and practices used in making estimates of structural costs on residential improvements and on appraisal of machinery and equipment.
--	T	T	T	T	Building construction including materials, workmanship and costs of plumbing, heating and ventilating equipment.
--	T	T	T	T	Methods, procedures and terminology used in market value appraisal of property and fixtures.
--	T	T	T	T	Basic principles of land economics and land appraisal.
--	T	T	T	T	Fundamental research methods including data collection and statistical analyses.
--	G	T	T	T	Factors affecting building and equipment depreciation and obsolescence.
--	G	T	T	T	Laws, regulations and court decisions affecting the appraisals of land, buildings, structures and personal property.
--	--	G	T	T	Characteristics of the different types of property and fixtures including depreciation, economic and technological aspects.
--	--	--	G	T	Local market indicators.
--	--	--	G	T	Information systems used for property assessments.
--	--	--	G	G	Principles and techniques of personnel supervision and training.

Skills and Abilities to:

The following skills and abilities apply to all classes:

- Apply appraisal principles and techniques in the appraisal of property.
- Compile, organize, and interpret information using various analytical methodologies.
- Apply statistical techniques to property appraisal.
- Recognize structural, economic and environmental factors affecting cost and depreciation of residential improvements.
- Interpret and work from blueprints, maps and property descriptions.
- Perform mathematical calculations accurately and interpret statistics.
- Draw sketches of improvement to scale.
- Establish and maintain detailed and accurate records.
- Read, understand and interpret oral and written instructions.
- Maintain effective working relationships with those contacted in the course of work.

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Appraiser II (in addition to the above):

- Read and interpret financial statements.

Appraiser III (in addition to the above):

- Provide technical training and guidance to subordinate appraisers.
- Apply appraisal principles and techniques in the equitable and justifiable appraisal of difficult and complex real property such as: custom homes, small and mid-sized commercial and industrial properties, large rural acreage holdings, complex residential income properties and personal property (i.e. mid-sized manufacturing facilities, retail and services industries).

Appraiser IV (in addition to the above):

- Apply appraisal principles and techniques in the equitable and justifiable appraisal of difficult and complex real property such as: large commercial and industrial facilities, multiple location and chain operations, downtown and regional shopping centers, large rural acreage holdings.

EDUCATION/EXPERIENCE:

Education, training and/or experience, which clearly demonstrate possession of the knowledge and skills stated above. All examples of such education and experience combinations must include a bachelor's degree; OR, three (3) years of recent experience in applying analytical methodologies and/or statistical techniques to property appraisal, AND 30 units from an accredited college or university; OR, three (3) years of the above mentioned experience, AND an Appraiser's certification issued by the Office of Real Estate Appraisers; AND,

Appraiser Trainee:

See Education/Experience above.

Appraiser I:

In addition to the Education/Experience above, one (1) year of recent experience as Appraiser Trainee in the County of San Diego or in a position equivalent to Appraiser Trainee.

Appraiser II:

In addition to the Education/Experience above, one (1) year of recent experience as Appraiser I in the County of San Diego or in a position equivalent to Appraiser I.

Appraiser III:

In addition to the Education/Experience above, two (2) years of recent experience as Appraiser II in the County of San Diego or in a position equivalent to Appraiser II.

Appraiser IV:

In addition to the Education/Experience above, one (1) year of recent experience as Appraiser III in the County of

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San Diego or in a position equivalent to Appraiser III.

Notes:

Recent work experience is that within the last five (5) years. Completion of appropriate course work from an accredited college or university may substitute for the experience requirement on a year-for-year basis up to a maximum of four (4) years.

SPECIAL NOTES, LICENSES, OR REQUIREMENTS:

Licenses:

Possession of a valid California Class C driver's license, which must be maintained throughout employment in this class, or the ability to arrange transportation for field travel. Employees in this class are required to use their personal vehicle.

Certificate:

Appraiser Trainee, I and II:

Possession of a permanent Appraiser's Certificate issued by the California State Board of Equalization within one (1) year of appointment.

Appraiser III and IV:

Possession of a permanent Appraiser's Certificate issued by the California State Board of Equalization at the time of appointment.

Working Conditions:

Travels extensively throughout the county. May be assigned to any work location in the county.

Probationary Period:

Incumbents appointed to permanent positions in these classes shall serve a probationary period of twelve months. (Civil Service Rule 4.2.5).